



Montana
Office of Public Instruction
Denise Juneau, State Superintendent

Annual Data Collection

Overview

September 2009

Annual Data Collection Overview

Introduction

The Annual Data Collection (ADC) packet accompanying this overview contains samples of the forms you will need to complete, as well as where to find instructions for getting started with our Internet Reporting and Information System, which we call IRIS. Also in the packet is your final personnel data from 2008-2009. You will be editing last year's personnel data on the screens. You can use these paper forms as a worksheet, making the changes on the paper first before entering those changes in ADC.

Please take the time to review the information below. It contains a list of changes and additions to the ADC for 2009-2010, steps to take for filing electronically, and general instructions and definitions for filling out the forms.



- A checkbox for Highly Qualified Teachers has been added to the staff assignment screen. You will need to check that box for every assignment that is being taught by a Highly Qualified Teacher.
- Homeless Liaison contact information will now be collected and updated through ADC
- A checkbox for Dual Credit assignments has been added to the staff assignment screen. You will need to check that box for every assignment for which students are receiving Dual Credit.
- Job codes have been added to specify whether special education teachers are Sole Providers or Not Sole Providers of Core Academic Instruction – see Glossary for definitions.
- Technology Use Report has been broken into two forms, one to be filled in at the school level and the other at the district level.
- District Personnel Recruitment Report replaces the Personnel Recruitment and Retention Report. This form addresses district vacancies by subject area and grade level, and the difficulty of filling them.
- Indian Education for All questions have been modified from last year.
- New passwords were mailed to the districts in June 2009. If you are doing data entry in September or October, remember to add SO to the end of the core password.

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Options for Filing Your Reports

Schools and districts will file electronically by logging on to the OPI IRIS system with a secure username and password. Passwords change annually, on July 1. We mailed out new passwords for 2009-2010 to the district authorized representative in June.

- Go to the OPI web site at <http://www.opi.mt.gov> and click on the tab marked IRIS (Internet Reporting Information Service).
- If this is your first time to use the system, you will need to download the Citrix Client software before logging in. See Citrix login instructions available on the login page, or at <http://www.opi.mt.gov/ADC/index.html>.
- Login using the user name and password that were mailed to the district in June, 2009.
- If you have not updated your Citrix software since December 2, 2008, you should update to the latest version by clicking on [Install Citrix clients](#) and following the instructions. You will need to close and reopen your browser after the update and then log in using your current user name and password.
- **Note for Vista users:** If you are a Vista user, you will need to go to the Citrix web site and get the latest client. Click on [Install Citrix Clients](#) to find a link to the Citrix web page.
- Follow the numbered steps on the data entry menu to complete all forms for your type of entity. Refer to the [ADC User Manual](#), available as a PDF at <http://www.opi.mt.gov/ADC/index.html> and also available on the Instructions button on the IRIS login page.
- The district level and school level personnel data that you reported to us last year will be pre-filled on the data entry forms. Make the necessary changes according to the [ADC User Manual](#).
- Preview and print a copy of each completed form by clicking on the Print Preview button at the top of each data entry screen, or select the Reports tab on the main menu to view and print each form. You will need to retain a copy of each form for your records.
- When you have completed all the data entry forms, click Submit on the data entry menu. The program will validate your data entry and notify you of any omissions prior to submittal. Once data entry is complete, you can do your final Submittal.
- A Preliminary Accreditation Report is generated once submittal is complete. Please print a copy, carefully review this report, and report any changes to the OPI prior to the listed due date.
- If you need to make changes after you have submitted your data, you will need to contact someone at the next user level to make the changes for you. Schools would contact the district, districts would contact the county superintendent, and county superintendents and coops would contact the OPI.

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- If you are a school doing your own data entry, mail your school calendar and master schedule along with a copy of each form to your district office.
 - Districts will review the data and forward the forms, calendars and master schedules along with a signed copy of the Authorized Signatures and Checklist form (one per district) to your county superintendent. Keep copies of the forms for your records.
 - County superintendents will review the data, sign the Authorized Signatures and Checklist form and forward the school calendars, master schedules and Authorized Signatures and Checklist to the OPI by the due date.
- If you are a district doing data entry for your schools, keep a copy of each completed form. Sign and mail the Authorized Signatures and Checklist, along with all the master schedules and school calendars, to the county superintendent.
- If you are a county superintendent doing data entry for your schools, keep a copy of each completed form. Sign and mail the Authorized Signatures and Checklist along with the master schedules and school calendars to the OPI by the due date.
- Submittal is not official until the OPI receives signed copies of the Authorized Signatures and Checklist page as well as the master schedule(s) and calendar(s).

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What needs to be reported and where to report it

Staff Assignments - Reporting Instructional Paraprofessional Staff

Please make sure that in reporting your personnel assignments, you distinguish between those Instructional Paraprofessionals that are paid with Title I monies and those that are not. In all cases, special education instructional paraprofessionals should be reported under the special education job codes (SE 25 or SE26 as appropriate).

Instructional paraprofessionals will be reported on the School Level Personnel Form. New paraprofessionals may not be in the personnel database. If they are not already on the list, you will need to add these people before you can assign them job codes and FTE. See the software user manual for *Adding a New Person Not on the List*.

For more information on qualified paraprofessionals, please refer to the Title I paraprofessionals Guidance, available at: <http://www.ed.gov/policy/elsec/guid/paraguidance.doc>

Staff Assignments - Reporting Special Education Personnel

Each school district and special education cooperative must report all personnel employed and/or contracted to provide special education and related services for students with disabilities. This includes both certified and licensed staff.

Special Education Cooperatives: Cooperatives will use job codes that specify “itinerant” for any employee or contracted individual whose job requires working with or serving children in more than one school district and requires travel. Refer to the list of special education job codes for cooperative personnel. Accuracy of itinerant personnel reported by a cooperative is important because that FTE total is used in the calculation for a cooperative’s travel entitlement.

School Districts: Report special education personnel in the same manner as all other personnel at the district and school levels. If an employee is not assigned to a specific school (example: a speech-language pathologist who provides speech services to students who are homebound throughout the city and has no ties to one specific school) the school district must either prorate the employee's time by individual schools in which those students reside, or choose one school at which to report the employee.

School districts participating in a special education cooperative do not report personnel who are employed by the cooperative and provide services to the school district - those personnel are reported by the cooperative.

When reporting school psychologists, school counselors, school nurses, and school social workers, the FTE counts must reflect the time employed to work with non-special education students and with special education students. The job codes should reflect this breakout (example: the time a school psychologist is employed to work with students without disabilities should be coded as SP23 [School Psychologist] and the time employed to work with students with disabilities should be coded as SP24 [School Psychologist, Special Education]).

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For teachers with a special education class assignment that includes PK, the staff assignment must reflect the percent of time that is spent with PK students. Calculate the percentage based on the number of PK students divided by the total students in the class.

Sole Providers: When entering data for special education staff the proper job assignment code must be used to indicate whether the teacher is the sole provider of academic content in the core academic subject.

At the elementary level, sole provider of elementary curriculum means a teacher who is the exclusive instructional decision maker for student(s) in grades PK-8. If a special education teacher is the sole instructor to any elementary student for 60% or more of the school day, the teacher is considered to be the "sole provider" of elementary curriculum and the SE04 (Special Education teacher sole provider) or SE05 (Special Education Intern sole provider) job assignment code would be used. If the special education teacher is not the sole provider of elementary curriculum for any student the SE02 (Special Education teacher not sole provider) or SE03 (Special Education Intern not sole provider) code would be used.

At the secondary level, Sole provider of core academic content means a teacher who is teaching a secondary level core academic class(s) without input from another teacher who meets the federal HQ requirements in that core academic subject. "Secondary level core academic class(s)" means any setting in which organized instruction of core academic content is provided to one or more students who are receiving credit for the class toward graduation. Because special education teachers often teach multiple subjects during any given period of the day, a class for secondary level special education teachers is defined as a subject. If a secondary special education teacher is the sole provider of academic content in a core academic subject for any student, the SE04 or SE05 job assignment code should be used for that subject. If a secondary special education teacher is not the sole provider of academic content for any student in a given core academic subject the SE02 or SE03 job assignment code should be used for that subject.

NOTE: For personnel who are paid from more than one federal program, the FTE must be broken out as accurately as possible to reflect time spent in each program. An example would be a teacher whose salary is paid from special education and Title 1 – the FTE breakout should reflect the salary breakout.

Staff Assignments - Reporting AP Courses

The College Board Advanced Placement (AP) Program allows students to pursue college level studies while still in high school. Detailed course listings in the Job Assignment Codes match the AP course and exam titles. Schools that offer these rigorous and challenging classes should choose the correct job code from the Job Codes dropdown list.

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The following forms are to be completed at the school level

Accreditation Data

Answer all questions regarding compliance with Accreditation Standards. Include explanations where necessary.

PIR Days and School Start and End Days

Definition of PIR day

A pupil instruction-related (PIR) day is a day of teacher activities devoted to improving the quality of instruction. Districts may receive funding for up to a total of seven (7) PIR days or a maximum of 42 hours. A minimum of three (3) days of professional development (six hours of contact time per day in no less than two-hour increments for a total of 18 hours) must be scheduled for all professional staff. PIR time must NOT include any time also counted as pupil instruction (PI) time. Professional development is defined in the Montana School Accreditation Standards (ARM 10.55.714 and ARM 10.65.101).

- You are not asked to list your vacation and early release days, only PIR days.
- Start and End days are the first and last days of pupil instruction (PI). Do not include teacher workdays that occur before pupils are in attendance in the fall or after pupils are finished for the summer.
- All PIR days can be classified in one of four categories. For each date you list, select one of the categories described in the Activities Code box at the top of the page.
- If you will be conducting two types of activity in one day, list each activity and its hours separately.
- If you have specific questions about PIR days or what information to include on this form, call (406) 444-4050 and choose option 7.

Alternative Education Programs

The purpose of this data collection is to identify which districts operate alternative education programs to serve at-risk students and gather identifying information about these programs. For OPI reporting purposes, an alternative education program is a "restructured" academic program to serve at-risk students and operated within an accredited public school. In past years, alternative education sites were included with off-site locations on the Accreditation Data form. They are now collected as two separate counts. Do not include alternative education program information when answering questions about off-site locations on the Accreditation Data form.

When entering information on individual teacher assignments, you will indicate if the assignment is an Alternative Education assignment.

Indian Education For All

This annual report will provide the Office of Public Instruction with information on school and district efforts to implement the requirements of MCA 20-1-501, Indian Education for All. The complete text of the law is included on the first page of the form. The OPI will use this information in planning for future staff development and technical assistance delivery options across the state.

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Technology Use Report

This annual report will provide the Office of Public Instruction with information for Federal reporting requirements, and assist the OPI in planning for future staff development and technical assistance delivery options across the state.

Indicate how many computers in your school are primarily used by students and how many are primarily used by teachers. Do not include computers that are strictly used by office or administrative staff in these counts. Of those counted, indicate how many have Internet access. We also want to know what types of Internet connections you have in your school (none, dial up, or high speed). For each connection type tell us how many of your student and teacher computers have that type of connection. Contact your district technology leader or your local Internet Service Provider, or review your phone bill for details about connection type and speed. The OPI recognizes that computers are used across grade levels and districts. If this applies to your situation, please read the instructions carefully pertaining to reporting shared computers (found at the top of the page). Please call (406) 444-4050 and choose option 5 if you have additional questions.

The following forms are to be completed at the district level

District Personnel Recruitment

The information will help identify shortage areas and provide support data for efforts undertaken to address those shortages. For schools meeting certain requirements, this data will help to determine whether new teachers will be eligible to participate in the loan forgiveness program.

We want to know how many openings in each subject, support or administrative area existed for the 2009-2010 hiring cycle, and how difficult it was to fill the positions.

Technology Integration

Answer Yes if the district has fully integrated technology into the district curriculum through implementing the Montana Technology Content and Performance Standards as of December 31, 2008.

Technical assistance can be provided by the Office of Public Instruction to districts who have not fully integrated technology into the district curriculum.

Distance Learning Report

This annual report will provide the Office of Public Instruction with the necessary information regarding district implementation of 10.55.907 ARM – distance, online, and technology-delivered learning – revised March 2004.

If you are a provider of distance learning, you will report which schools you are providing to as well as the names of the courses, the instructors' folio IDs, and the grade levels being served.

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If you are receiving distance learning, you will report the names of your providers, the courses being taught and the number and grade levels of students being served.

School districts may receive distance learning to supplement instruction as they would other supplementary resources without restriction so long as the instruction meets all the content and performance standards for that grade and subject. One exception should be noted here: Rosetta Stone does not include a cultural component. If you elect to use this program, the district must provide a staff person to provide the missing piece.

Testing Coordinators

The district test coordinator is the person responsible for the successful communication, coordination, materials distribution/return, training, and administration of statewide testing. At this time, statewide tests include the Criterion-Referenced Test (CRT) and CRT-Alternate in Reading and Math in grades 3-8 and 10 and in Science in grades 4, 8, and 10 and the English Language Proficiency Test (ELP) in grades K-12. This form will be pre-filled with the test coordinator information we currently have on file. You should make any necessary corrections and adjustments. When the information is correct, please check the box confirming you have reviewed the entry.

This information will be collected with the Annual Data Collection each October. Notify Judy Snow at jsnow@mt.gov of any changes that occur between October and the spring testing window.

Homeless Liaison

The district homeless liaison designated by the Authorized Representative should be an individual who is aware of his or her required duties and is able to respond to questions or problems related to homeless students or their families regarding education issues. This form will be pre-filled with the homeless liaison information we currently have on file. You should make any necessary corrections and adjustments. When the information is correct, please check the box confirming you have reviewed the entry.

If this information needs to be updated during the year, contact Clare Bridge at the OPI, (406) 444-0906 or cbridge@mt.gov.

Dual Enrollment Opportunities

This report will assist the OPI to identify which districts provide dual enrollment opportunities and to gather specific information about these programs. Dual enrollment refers to the practice in which high school students are enrolled in high school and post-secondary courses at the same time. There are three categories of such opportunities:

- College credit only – students receive college credit for courses taken from a post-secondary institution but do not receive high school credit. Students may or may not be taking these courses during the school day.

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- Dual credit – students receive both college and high school credit for courses taken from a post-secondary institution. Students may or may not be taking these courses during the school day.
- Concurrent enrollment – the district offers these course during the school day and they are taught by district high school faculty who have been approved by the post-secondary institution to teach these college level courses. Students receive both high school and college credit for the course(s) completed.

Preliminary Accreditation Report

The software automatically generates your Preliminary Accreditation letter once your data has been submitted. District superintendents will need to print out and review that report. Based upon that review, districts need to notify OPI of any changes or corrections. If you do not respond by the due date listed on the report, the data will be presented to the Board of Public Education as-is.

Thank you for taking the time to read this overview. Please let us know if you have any questions. You can contact the Office of Public Instruction ADC Help line at (406) 444-4050

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Printing out Paper forms to use as worksheets

- You might find it convenient to print copies of the forms and distribute them to various personnel for collecting the necessary data. Those paper forms can be returned to the data entry person for entry into the system. Go to the Annual Data Collection web page at <http://www.opi.mt.gov/ADC/index.html> to see what forms are available.

IRIS is OPI's Internet Reporting and Information System. The Annual Data Collection (ADC) takes place every Fall, and collects and reports a variety of non-fiscal data used in School Accreditation and State and Federal Reporting. The Annual Data Collection is best done **electronically** - see the **Overview**. For those who choose to use a paper process, print and complete the forms below. For assistance with completing either the electronic or paper versions, phone (406)444-4050.

These Forms are REQUIRED for those who choose to file by paper:

Form Name	Who is required to complete?	Description
Coop Authorized Signature and Checklist	SE Coop	Authorized signature and checklist to confirm complete submittal
Special Education Coop - Personnel	SE Coop	Assignment of special education cooperative personnel
Organization Setup	District/School	Reporting of pupil instruction time
Annual Data Collection - Personnel	School	Assignment of teachers and specialized school personnel
Accreditation Data	School	Reporting regarding compliance with accreditation standards
Pupil Instruction-Related Days	School	Reporting of the first and last day pupils attend school and pupil instruction-related days (PIR)
Alternative Education Programs	School	Reporting of alternative education programs to serve at-risk students.
Indian Education for All	School	Reporting of district efforts to implement the requirements of MCA 20-1-501

- Choose the documents you would like to print.
- Hint for printing documents in PDF format: Open the PDF and choose the Print icon from the tool bar. Check the 'Print as image' box located below the Properties button.
- Please complete all forms and reflect information **as of the first Monday in October.**
- Full-time equivalent (FTE) refers to the number of hours of work normally required in a full-time position. Please do not use fractions (i.e., 1/3). The total FTE for one person CANNOT EXCEED 1.000. For example, a full-time 4th grade teacher is 1.000 FTE, as noted on the school level personnel report. Another example: a person serves as a half-time (.500) FTE curriculum coordinator, as reported on the district level personnel report, and is a half-time (.500) FTE principal, as reported on the school level personnel report.
- An FTE unit is a portion of a full-time position dedicated to a specific job assignment. The FTE unit values are based on the number of FTE unit minutes per day (i.e., 45 minutes for period one) divided by the total instructional minutes per day. Give each of your periods and FTE units a name and a decimal equivalent. See the attached worksheet for instructions and examples.
- District Level Administrative Personnel: One form submitted per district. Districts with district level personnel (i.e., superintendents, curriculum coordinators, etc.) must use only the job assignment codes listed as District Level Job Assignment Codes. Report ONLY the district level administrative job assignment's FTE or portion of FTE on the District

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Level Administrative Report. If district level administrators also have specialized or teaching assignments, those FTE portions must be reported on the appropriate report.

- School Level Specialized, Teaching, and Paraprofessional Personnel: Each school must submit this form indicating the school level assignments for each individual. Use **ONLY** job assignment codes listed as school level job assignment codes. This form lists all certified school level specialized and teaching personnel for a school. You will also include all school level instructional and special education paraprofessional staff on this form.
- If a person is assigned to more than one school, prorate the FTE between schools and report **ONLY** the FTE portion (i.e., 0.500, 0.33) for each school. Teaching assignments (including preparation time, study halls and other) and department chair assignments should be indicated on this form. **DO NOT DUPLICATE** teaching assignments of teachers shared between schools. If a teacher is shared between schools, indicate preparation time on one school's report only. If a teacher has an assignment period (i.e., band), which includes students from multiple levels (i.e., 7-12), list this assignment period on one school's report only. Make a note in the description field that the class contains students in other grades.
- Abbreviations on forms:
 - Job Code - from Job Assignment Code list
 - Job Description - from Job Assignment Code list
 - Course Description - course detail. For "Math" please list specific course, i.e., Algebra, Geometry
 - Grade Low/Grade High - Grade level(s) of class taught (i.e., 7, 1-2, 9-12)
 - Student Load - Number of students enrolled in class
- All other forms: See instructions on form and in previous section of this Overview.
- Documentation for corrections to district and school level information must be submitted to the Accreditation Division prior to December 1, 2009.

Worksheet for Naming Periods/FTE and Calculating FTE

Creating Period/FTE Names

If your FTE is for district, special education coop, administrative, specialized or elementary teaching staff, name the unit to match the calculated FTE. For example, for a half time teacher, name the unit **0.500 FTE**.

If your day is broken into periods, (middle schools, junior high and high schools) the name will have up to 3 parts:

1. The number of the period.
2. The days of the week the class meets. Write just the initial of the day; use R for Thursday. If classes meet on A or B days, write the letter. If a class meets every day, leave the second part of the name blank.
3. Session type and number: yearly, semester, trimester, quarter, other. If the class meets all year, leave the third part of the name blank.

Examples of Period/FTE Names:

P-1 = Period 1, meets every day of the week, all year.
P-1 MWF = Period 1, meets Mondays, Wednesdays and Fridays, all year.
P-1 Q1 = Period 1, meets every day of the week, quarter 1.
P-1 TR S1 = Period 1, meets Tuesdays and Thursdays, semester 1.
P-1 A T1 = Period 1, meets on A days, trimester 1
1.000 FTE = Full-time
0.750 FTE = Three-quarter time

Calculating FTE

FTE is calculated by dividing the number of instructional minutes for the particular time unit by the total number of instructional minutes. Instructional minutes do not include passing time, unstructured recess or lunch.

$$\frac{\boxed{} \text{ minutes per day} \times \boxed{} \text{ days per year}}{\boxed{} \text{ total minutes per day} \times \boxed{} \text{ total days per year}} = \text{calculated FTE}$$

Examples: In these examples, assume the school has 360 instructional minutes per day and has 180 days in the school calendar.

A part time 5th grade teacher teaches for 120 minutes per day all year.

$$\frac{120 \times 180}{360 \times 180} = 0.333$$

Period 4 meets 45 minutes per day for one semester (90 days).

$$\frac{45 \times 90}{360 \times 180} = 0.063$$

Period 7 meets 27 minutes per day, 3 days per week (108 days), all year.

$$\frac{27 \times 108}{360 \times 180} = 0.045$$